



IDP for Supervisors

Module 4: Manage Phase Responsibilities



What Is Your Role in the Manage Phase?

After the IDP has been approved and activated in SATERN, the **Manage** phase begins. Your responsibilities during this phase include supporting the employee's training and development, and monitoring progress of development activities.

This module will cover the following tasks:

- Supporting Training & Development Activities
- Running Employee Reports
- Meeting with the Employee to Review Progress





Support Training & Development Activities

Now that the IDP is approved, both the employee and the supervisor will implement the plan. The employee will begin to schedule and complete the activities outlined in the plan.

However, the employee may encounter problems with accomplishing developmental goals, or need your guidance in executing the plan.

Ways you can offer support:

- Provide access to resources (e.g., funding, mentors, etc.)
- Approve enrollment requests for academic classes, conferences, and training courses, submitted through SATERN
- Help the employee with the nomination or registration processes
- Assist the employee in developing an action plan for developmental assignments or on-the-job training
- Get involved before and after training to maximize the employee's developmental experience





Run Employee Reports

As a supervisor, you can run reports in SATERN that will help you monitor the progress the employee has made toward IDP goals and to see what learning activities have been completed. You may find it helpful to print and review employee reports in preparation for supervisor-employee meetings where you discuss the IDP.

SATERN allows you to generate a number of different standard reports. All reports have the same options to describe how you wish to run the report.

Tip: You must be viewing your own records in order to access all reporting options.

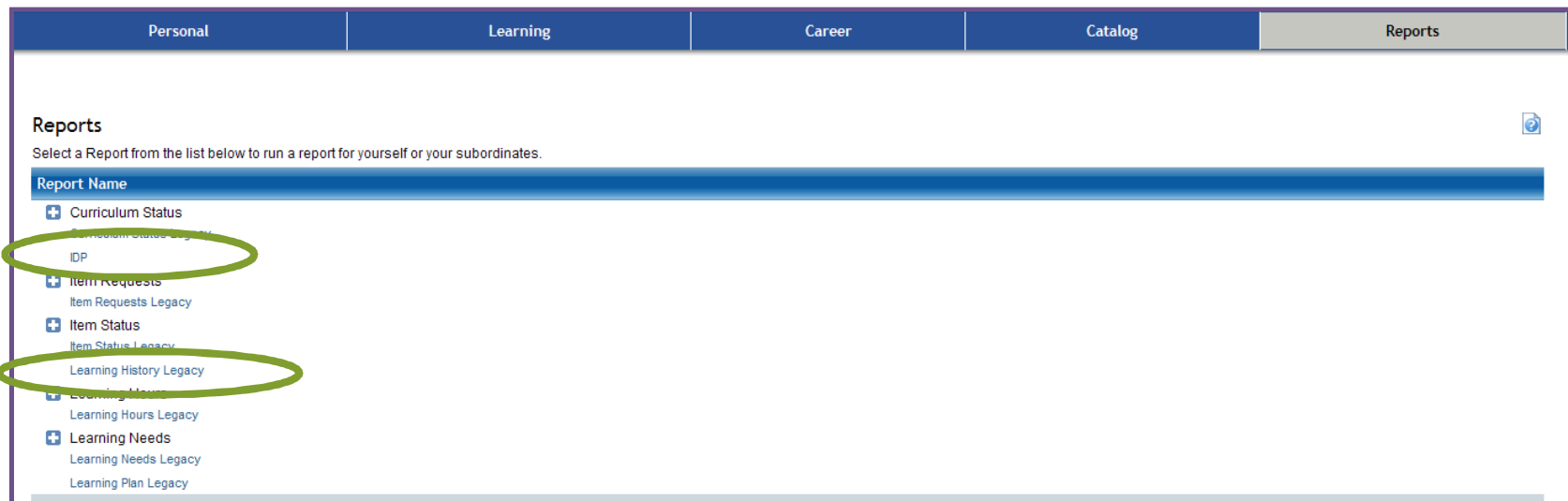




Run Employee Reports (cont.)

To run a report, select **Reports** from the main menu. There are two SATERN reports that directly relate to monitoring IDP progress:

- IDP
- Learning History Legacy





Run Employee Reports (cont.)

The **IDP** report includes data on:

- Goals
- Development activities
- Comments
- Progress made toward goals and activities

Plans			
Learners			
User Name:		*****	
Learner Name:		SHUKLIN, SOPHIA	
My IDP			
IDP Title:	Mechanical Engineering	IDP Period:	PY 2009 - 3 year
IDP Status:	Active/Approved	Version:	Current
Effective Date:	5/1/2009 12:00 AM EST	Expiration Date:	4/30/2010 12:00 AM EST
IDP Notes			
Created By:	Supervisor, MYERS, JENNIFER - 12/18/2009 10:43 AM EST		
Notes:	hi Sophie, I am going to reject your plan because I do not see the specifics that will support your overall development. Please modify the activities to reflect how you plan on achieving your certificate. Then resubmit it to me. Also, please take an introductory class to engineering before making your changes this will help you set the plan.		
IDP Areas			
IDP Area:	Development	Title:	Description:
Group By			
Details:	Section: SHORT-RANGE GOALS: 1 YEAR		
Goals			

Prepare

Create

Finalize

Manage



Run Employee Reports (cont.)

The **Learning History** report includes data on:

- Completed catalog items
- External development activities completed and recorded by the learner
- External development activities completed via the SF-182

User Learning History

Learner

User Name: *****Learner Name: SHUKLIN, SOPHIA

Item Events

Item ID	Title	Scheduled Offering ID	Completion Date	Grade	Status
COURSE NASA-SAT-09-TTT-SESSION1One (Rev 8/25/2009 10:26 AM EST)	SATERN UPGRADE TRAIN THE TRAINER SESSION 1	46249	11/4/2009 06:00 PM EST		Completed
COURSE HQ-005-09 (Rev 8/21/2009 12:00 PM EST)	2009 NASA HEADQUARTERS SECURITY AWARENESS TRAINING		10/21/2009 12:54 PM EST		Completed
COURSE HQ-ITS-004-08 (Rev 3/12/2009 04:26 PM EST)	HQ-IT SECURITY FOR MANAGERS 2009	41585	5/8/2009 02:30 PM EST		Completed
COURSE ITS-003-08 (Rev 3/2/2009 12:00 PM EST)	BASIC IT SECURITY FOR 2009		5/8/2009 02:30 PM EST		Substitute
COURSE ITS-004-08 (Rev 3/2/2009 12:00 PM EST)	IT SECURITY FOR MANAGERS 2009		5/8/2009 02:30 PM EST		Substitute
COURSE HQ-025-07 (Rev 2/4/2008 08:00 AM EST)	NASA RECORDS MANAGEMENT FOR EVERYONE		4/8/2008 01:12 PM EST		Completed





Run Employee Reports (cont.)

After you select a report, you will have a choice of running a report for yourself, your direct reports, all in your chain of command, or all.

A screenshot of a web-based report configuration interface. The title 'Run IDP' is highlighted in a blue bar. Below it, the 'Learner' section has four radio button options: 'Self', 'Direct Subordinates', 'All Subordinates' (which is selected), and 'All'. This entire section is circled in green. Below the radio buttons are text input fields for 'Report Title' (containing 'Plans'), 'Report Header', and 'Report Footer'. Further down are 'Report Destination' options: 'Browser' (selected) and 'Local File'. The 'Report Format' section includes radio buttons for 'XML', 'CSV', 'HTML' (selected), and 'PDF'. At the bottom, there are two checkboxes: 'Mask Learner ID' (checked) and 'Page Break Between Records' (unchecked).

You also have a number of choices regarding report display options.





Run Employee Reports (cont.)

If you need to run a report for only one employee, select **My Employees > Subordinates** from the menu.

The screenshot shows the SATERN web application interface. At the top, a navigation bar includes the NASA logo, a search bar, and links for Home, Search Catalog, Help, and Logout. Below this is a main header with the SATERN logo and the text "System for Administration, Training, and Educational Resources for NASA". A horizontal menu bar contains tabs for Personal, Learning, Career, Catalog, Reports, and My Employees. The My Employees dropdown menu is open, showing options: Dashboard, Subordinates (highlighted with a green oval), Learning Plans, and Registrations. The main content area on the left welcomes JENNIFER MYERS and provides information about SATERN. On the right, there are sections for Alerts (showing no alerts) and Catalog (with links to view instructor-led and online items).





Run Employee Reports (cont.)

In the **Subordinates** window, choose the employee by clicking the Home (🏠) icon.

Subordinates

Subordinates

[JENNIFER F MYERS](#)

OFFICE OF HUMAN CAPITAL
MANAGEMENT
(202) 358-0080

✉ 🏠 📅

Learning: Next 30 Days (1)
Curricula: Current
Assessments: None
Goals: None
Approvals: None

[SOPHIA SHUKLIN](#)

(301) 286-8217

✉ 🏠 📅

Learning: Current
⚠ Curricula: Incomplete (1)
Assessments: None
Goals: Unknown (1)
Approvals: None

Prepare

Create

Finalize

Manage



Run Employee Reports (cont.)

Viewing will indicate that you are in your subordinate's profile. Click **Reports** tab to run reports for selected individual employee.

Personal **Learning** **Career** **Reports**

Viewing: SOPHIA SHUKLIN
No Job Position Title [\[Return to Org Chart\]](#)

Welcome SOPHIA SHUKLIN
12/18/2009

Welcome to SATERN, NASA's official learning management system. The System for Administration, Training, and Educational Resources for NASA (SATERN) provides simplified one-stop access to high-quality training products and processes to support learning and development.

SATERN provides desktop access to training enrollment and continuous learning for the NASA workforce. Find out more information on the SATERN Informational Web site or contact your Center training office.

For assistance, contact the NSSC Contact Center at 1-877-NSSC-123 (877-677-2123) or NASA-satern.support@nasa.gov.

Personal
The Personal menu provides you with tools to manage your Profile and Regional Settings.

Alerts
You have no alerts at this time.

IDPs [IDP >>](#)

Goal Name	Type	Target Date	Percent Toward Target
Basics of Engineering	Development	1/22/2010	0.00%

You can also open their IDP and select **Print IDP**.

IDP Title : Systems Engineering (Select Other IDP)
* IDP Title : Systems Engineering
IDP Status : Draft
Effective Date : 5/1/2009

IDP Period : Performance Year 2009 (1 year) Select | Clear
IDP Purpose : To support a career shift to systems
Version : 0 (current) v
* Expiration Date : 4/30/2010

This IDP contains

Click Print IDP.

Print IDP **List all IDPs** **View/Add Notes** **Save** **Submit for Approval**





Meet with the Employee to Review Progress

The IDP is designed to be a realistic working plan and may change over time as priorities and needs change. The IDP should be reviewed periodically to ensure that the activities continue to be current and worthwhile in supporting the intended objectives and goals. You should meet with the employee to follow up on IDP progress.

During this meeting the you can:

- Discuss the employee's progress toward goals and confirm that progress is being recorded in SATERN
- Evaluate the effectiveness of the training and determine if the development activities are meeting development needs
- Provide advice on any changes or mid-term adjustments that may be necessary
- Agree on modifications to the IDP and when they will be made





Meet with the Employee to Review Progress

When an employee revises his/her IDP, the IDP will receive a new version number. All previous versions will be retained.

When an employee revises his/her IDP by adding or removing goals or activities, the IDP will be re-submitted to you for approval.

Personal	Learning	Career	Catalog	Reports								
<h3>My IDPs and Goals</h3> <p>The details of this plan are shown below. You may update the Status of Goals and Activities. Additionally, you may add or edit Goals to the Plans. You may add or edit supporting Activities for those Goals. However, if you have made changes since the Plan was last approved, you must submit the Plan for Approval again. Only approved Goals and Activities are reflected in the Performance Review. You may view or add notes to this Plan at any time. To select another plan, hover your mouse over the image by the side of the current plan Title and select a different Plan. If you have been designated as a Coach, you may view / update or add other User's Plans.</p> <table><tr><td>IDP Title : Mechanical Engineering (Select Other IDP)</td><td>IDP Period : Performance Year 2009 (3 year)</td></tr><tr><td>IDP Status : Active/Approved (Expires 132 days from now) ▶</td><td>IDP Purpose : Certification</td></tr><tr><td>Effective Date: 5/1/2009</td><td>Version : 1 (current) ▼</td></tr><tr><td></td><td>Expiration Date: 4/30/2010</td></tr></table> <div>Print IDP List all IDPs View/Add Notes</div>					IDP Title : Mechanical Engineering (Select Other IDP)	IDP Period : Performance Year 2009 (3 year)	IDP Status : Active/Approved (Expires 132 days from now) ▶	IDP Purpose : Certification	Effective Date: 5/1/2009	Version : 1 (current) ▼		Expiration Date: 4/30/2010
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Effective Date: 5/1/2009	Version : 1 (current) ▼											
	Expiration Date: 4/30/2010											





Summary

- The IDP is tool that can be used to discuss career goals, career development, and expertise development activities with your direct reports.
- The planning and communication between employees and supervisors is a beneficial aspect of creating an IDP.
- You are responsible for initiating discussions with your direct reports about Individual Development Planning, and for approving IDPs.
- It is important to meet periodically with your employees to track progress and to adjust the plan if necessary.
- For additional information on the IDP, go to <https://saterninfo.nasa.gov>.